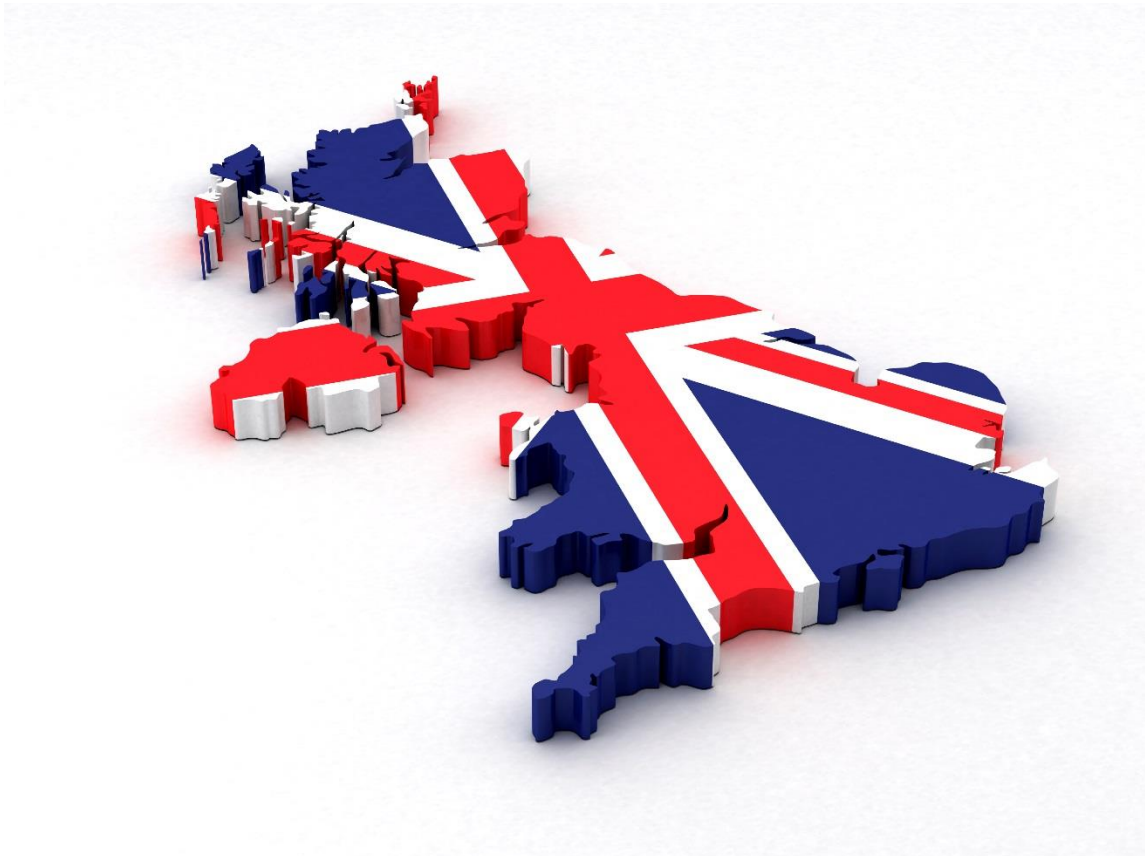




UK Contact Centres: 2021-2025

The State of the Industry & Technology Penetration
(18th edition)

The reality of your market today - and in the future



Market sizing: 4,000+ UK operations analysed, with market sizing tracked over 18 years

Detailed segmentation: 16 vertical markets, 7 size bands, 12 regions

Forecasts until 2025 for agent positions, contact centres, jobs and technology penetration

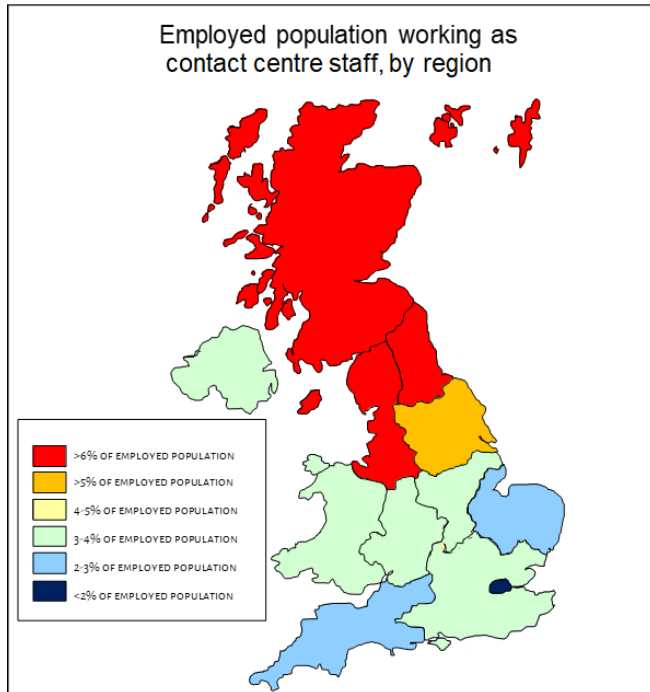
Technology penetration rates: 13 technologies, by vertical and size band, with forecasts

Published January 2021

Key findings

There are 6,035 contact centres in the UK, with 812,000 agent positions.

After the UK contact centre industry's decline in 2009 – both in terms of contact centres and agent positions – 2011-16 saw a steady increase after 2010's tentative growth. 2020 has seen a jump in agent positions due to test and trace, and the need to support the public during the lockdowns.



Large contact centres (with over 250 agent positions) employ more than half of all contact centre staff, despite only accounting for 9% of physical contact centre sites.

The outsourcing industry is the largest employer, with over 250,000 contact centre jobs in the sector.

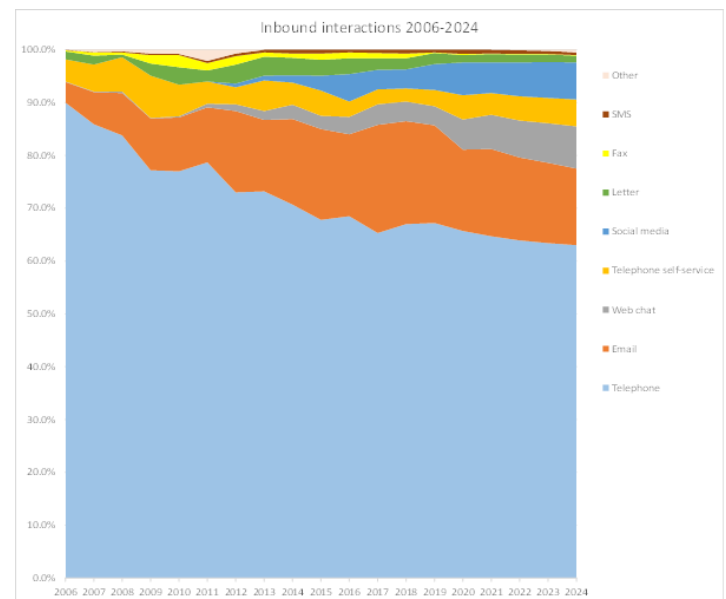
4.01% of the UK's employed population work in contact centres.

The public sector has most contact centres (12%), although the outsourcing sector has the most agent positions (19%). Finance, retail & distribution, services, IT, communications and utilities are also important sectors.

The mean average contact centre size is 135 agent positions, with outsourcers, utilities, communications, retail & distribution and finance contact centres having a larger-than-average mean size.

The UK contact centre industry is expected to shed over 35,000 jobs and see over 300 contact centres close over the next 4 years, as a result of automated digital channels, increasing usage of self-service, the expected effects of Brexit and the fallout from the pandemic.

Outbound calling activity has declined considerably to 19.7%, from 33.7% in 2004, although more service-focused outbound calls are being made.



Web chat and social media customer service interactions have jumped by over 50% in 2020.

Telephony volumes will decline to around 63% of total contact centre interactions by 2024.

Web chat penetration will grow to 77% by 2025.

26% of the businesses using a workforce management solution are looking to replace it.

35% of UK contact centres intend to implement artificial intelligence in the next 12 months.

Almost two-thirds of UK contact centres expect to have more than half of their agents working remotely in 2021.

Report contents:

- 105 charts and data tables show the size, structure and future of your market
- Based on ongoing primary research surveys with thousands of UK contact centres
- Unique historical data from 1995 onwards, with forecasts to the beginning of 2025

Vertical markets covered for market sizing:

- Communications
- Engineering & Construction
- Finance
- Food & Drink
- Housing Associations
- IT
- Manufacturing
- Medical
- Motoring
- Outsourcing & Telemarketing
- Printing and Publishing
- Public Services
- Retail & Distribution
- Services
- Transport & Travel
- Utilities

Size bands:

- 7 size bands (from 10-25 seats to 1,000+ seats)

The report is divided into 8 sections:

Market Sizing

- Measures the number of contact centres and agent positions by:
 - contact centre size band
 - vertical market
 - vertical market within size bands

Geographical Location

- Agent positions by region
- Contact centres by region
- Average contact centre size by region

Employment

- Contact centre employment by vertical market
- Predicted net change in jobs 2020-2024 by vertical market
- Contact centre employment by region
- Employment forecasts by region, 2020-2024
- Employment by contact centre size band
- Likely effects of Brexit and the pandemic on vertical markets and their contact centres

Market Forecasts to the beginning of 2025

- UK contact centres, 1995-2024
- UK agent positions, 1995-2024
- Vertical market forecasts for contact centres and agent positions end-2024
- Drivers for change and the effects of Brexit, by vertical market

Inbound and Outbound Calling

- Outbound activity and agent positions by contact centre size and vertical market
- The role of mobile telephony and legislation on outbound calling

Virtual Contact Centres & Homeworking

- The virtualisation of multisite contact centres
- Benefits & inhibitors to virtualisation
- Current & future use of homeworking

Multichannel Customer Contact

- Contact centre inbound interactions by channel, 2006-2024 (email, voice, self-service, social media, web chat, letters, fax)
- Relative changes in inbound channels

Technology Penetration

- Current use, plans for replacement and planned implementation timescales
- 2020 and 2024 penetration rates
- Segmented by vertical market and contact centre size
- 13 technologies:
 - Artificial Intelligence
 - Automated Speech Recognition
 - DTMF IVR
 - Email Management Systems
 - Gamification
 - Interaction Analytics
 - Interaction Recording
 - IP Infrastructure
 - Management Information Systems
 - Mobile Customer Service Apps
 - Outbound Dialling
 - Web Chat
 - Workforce Management Systems
- Use of Cloud in 2020

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